



Outreach Modifications

SOW 100111-01

Request

Customer is requesting multiple enhancements be made to Outreach. The requested changes are outlined and discussed in detail below.

Modification Requests

Map Changes

Add the below capabilities to the existing map display.

1. View location of activities on map with ability to see other information (like number of attendees). Pinpoint them on the map with a bubble for each that displays Name of event, location, and number of attendees.
2. View attendee location on map so the customer can see density of attendees by location.
3. Map report that shows all the target areas for the type of activity(s) they have selected. This will let the customer see the density of their radio/TV campaigns.



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Details

Users will build their Outreach Grid by using the search by or advanced search feature. A new button will be added ("Show on Map") that will allow users to see selected activities on the map. After the search has been performed they will select the "Show on Map" button.

[Home](#) [Outreach](#) [Reports](#) [Administration](#)

Awareness Activity Summary [HELP](#) | [CONTACT](#)

Search By: [Show on Map](#) [CREATE ACTIVITY](#)

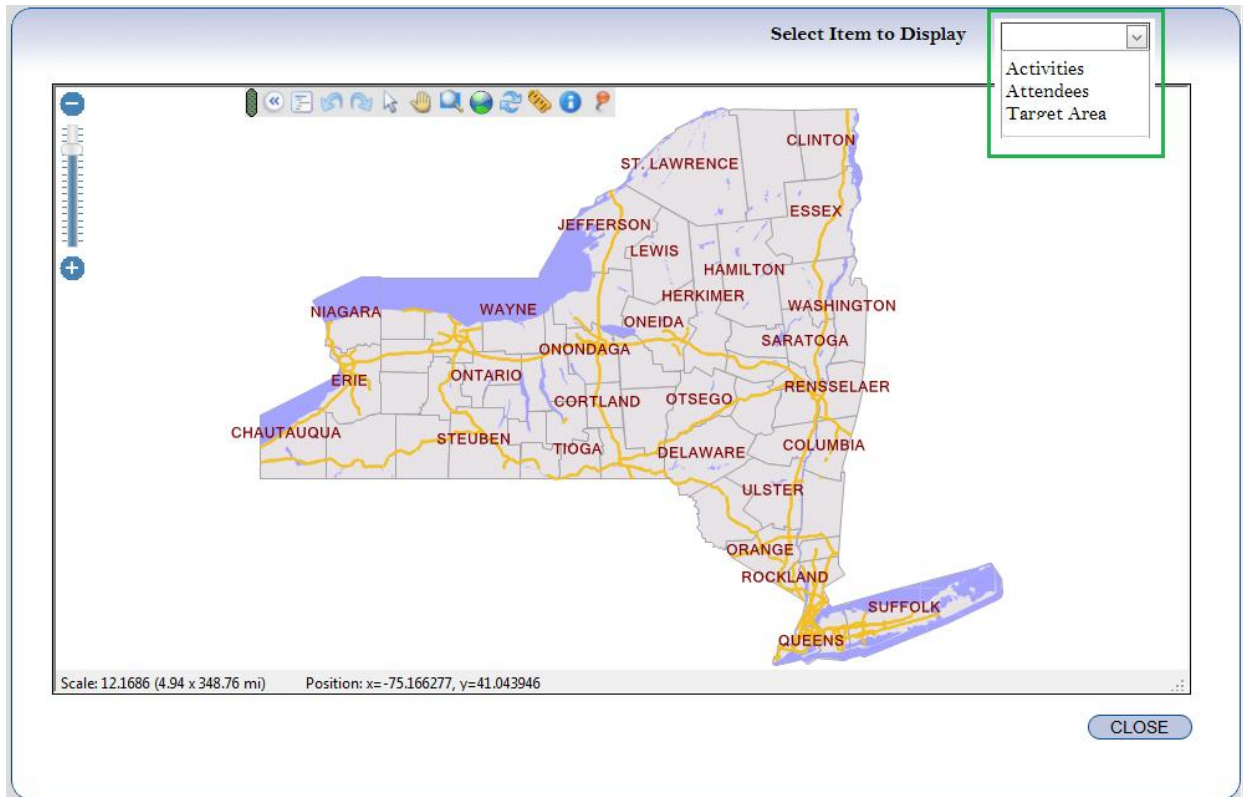
Activity Name	Awareness ID	Category	State	County	Place	Complete Street Name	Liaison
Presentation - New Operator - Inergy	1110180016	Excavator Training	NY	SCHUYLER	Watkins Glen	3768 Route 14	Ross, Don
Presentations for NYS Fire Marshal's Seminar	1110220001	Excavator Training	NY	SCHUYLER	Montour Falls	600 College Ave	Ross, Don

Once this option has been selected a map will be displayed. The user must then select the item to display based on the grid items. The choices are:

- Activities
- Attendee's and
- Target Areas

Show On Map		
Field Name	Field Explanation	Notes
Activity	Name of Activity	Bubble display = name of activity/event, location, and number of attendee's
Attendee's	Attendee information	Bubble displays attendee name, company name, contact information
Target Areas	State and County	Bubble displays State and County

Once selected the area will be represented by a pushpin. The user can then click on the pushpin to view more information about that activity.



Users can right click on the map at any zoom level and print the map.



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Track Different Attendees

Track different attendee types such as pre-registers VS walk-ups. After identify these two different types customer would also like to select if the attendee actually attended.

Attendees	First Name	Last Name	Company Name
No attendees have been recorded.			
+ Add Attendee			

The below screen will be modified to capture this information. Once the user selects "Add Attendee" they will now be able to choose the attendee type.

NOTE: If Walk-up is selected the Attended checkbox will be selected by default. This field is NOT required.

Attendee Details ✕

First Name:

Last Name:

Company:

Phone: () - x

Email:

Address:

Address 2:

City:

State:

Zip:

Type:

Attended: ☐

ADD

ADD & CLOSE

CANCEL



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Attendee Details		
Field Name	Field Explanation	Notes
Type	Dropdown Default – Blank	Options are Pre-Register and Walk-up
Attended	Checkbox if person actually attended Default – Unchecked	If walk-up is selected box will automatically be checked.



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Attendee Report

Create an attendee report that will allow Dig Safely New York to print out detailed attendee information. This report will be run from the activity. A new button will be added at the bottom of the report.

[Home](#) [Outreach](#) [Reports](#) [Administration](#)

Outreach Activity Details: 1110170008 [HELP](#) | [CONTACT](#)

General

Activity Name

Promotion-Crown Electric

Target Audience

Contractor Sales

Date Range

09 / 14 / 2011 03 : 50 PM to 09 / 14 / 2011 03 : 50 PM

Time Zone:

(GMT-05:00) Eastern Time (US & Canada)

People Reached

State	County	# of People Reached
NY	WAYNE	1

Delivered Materials

Description	Attachment	Count
shirt		

Location

State: NY County: WAYNE City: Union Hill

Dir: Street: County Line Type: Rd Dir:

Address 2: NY Route 104 Zip:

[Show Directions](#) [View Location](#)

Liaison

Ross, Don

[REPORT](#) [SUMMARY](#) [MODIFY](#) [DELETE](#) [COPY](#)



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http://d.digsafelynewyork.com/?ID=56 - IRTNet - Microsoft Internet Explorer provided by IRTN Solutions, Inc.


Attendee Details Report
A detailed report on attendee's

Attendee Company

1 of 1 100% Find | Next Select a format Export

Attendee Details Report

Attendee	Company	Attendee Information	Event Information	Date
John Yehl	Osha	555-121-5521, Jyehl@test.com, 100 Main Street, Ny Ny 12345	Union Employees 30hr Osha Class	1/7/2011



(c) www.irthnet.com Page 1 of 1 10/25/2011 2:47:42 PM

100%

One page per user.

Report Fields

Field Name	Field Explanation	Notes
Attendee	Dropdown. Default = All List of all attendee's that attended	Default – All

Report Details

Field Name	Field Explanation	Notes
Attendee	Name of attendee	
Company	Name of attendee's company	
Attendee Information	Attendee's phone number, email address, and mailing address	
Signature	The attached scanned signature.	The JPG image that was attached



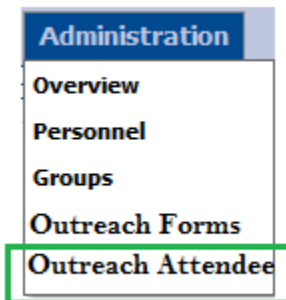
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Manage Attendees

Add the ability to manage and maintain attendee's.

A new menu option will be added under the current "Administration" menu called "Outreach Attendee".



After the new menu option has been selected the below screen will be available. From this screen administrators can add and manage attendee's. To modify Administrators will click on the attendee hyperlink. To add users will click on "Add Attendee".

Attendee Summary

HELP | CONTACT

Available Tasks	
Add Attendee	

Search in: < All Columns > <input type="text"/>		
Name ↑	Company	Primary E-Mail
adams, demo		jadams@irthsolutions.com
Adams, Jason		jadams@agti.com
AGT, AGT		tpeugh@irthsolutions.com
Ball, Rod		rball@irthsolutions.com
Bame, Larry		lbame@irthsolutions.com
Bame, Larry		lbame@irthsolutions.com
Cachat, John		jcachat@irthsolutions.com
Chen, Xiaoyu		xchen@agti.com
Collier, Gerald		gcollier@irthsolutions.com
Ellifritz, Brad		bellifritz@irthsolutions.com
gartner, karla		kgartner@irthsolutions.com
Griffin, Archie		ktest@irth.com
Hayes, Woody		ktest@irth.com
Heath, Bill		bill.heath@mail.callsunshine.com
Knight, Bobby		ktest@irth.com
1 2 3 4		



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Once the attendee has been selected they can then be modified.

Attendee Detail

Available Tasks	General Information:
Modify this Attendee	Name: Trent Peugh
Go to Attendee Summary	Company: IRT H
	Phone: 614-784-8000
	Email: tpeugh@irthsolutions.com
	Address Information:
	Address: 5009 Horizons Drive
	Address 2:
	City: Columbus
	State: Ohio
	Zip: 43220



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Once the user selects Modify fields can then be available for edits.

Note: This is the same screen for adding an attendee as well.

Modify an Attendee

Personal Information:

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Company:	<input type="text"/>
Primary E-mail:	<input type="text" value="tpeugh@irthsolutions.com"/>

Address Information:

Address:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip:	<input type="text"/>

SAVE

CANCEL



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Searching and adding attendees can also be done from the activity screen (when attendee is available from the forms).

Attendees	<u>First Name</u>	<u>Last Name</u>	<u>Company Name</u>
	No attendees have been recorded.		
	+ Add Attendee		

When the user clicks on the add attendee button this screen will appear. Users can type in an attendee and search. If the attendee is found they can be added. If not they can be created.

Note that this attachment is not for the attendee itself, but for the attendee and event combination.

Add an Attendee to this Activity

Attendee Name:

Search

Enter Attendee information in the above box and push Search button to find

Message if attendee is not found. Notice Create Attendee is not available.

Add an Attendee to this Activity

Attendee Name:

Search

No Attendees found

[Create Attendee](#)

Once Create Attendee is selected a new attendee can be added.



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Attendee Details ✕

First Name:

Last Name:

Company:

Phone: () - x

Email:

Address:

Address 2:

City:

State: Zip:

Type:

Attended: ☐

ADD

ADD & CLOSE

CANCEL



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The ability to attach an image (such as scanned in signature) will be added. The user will browse to the location of the image and the image will be saved.

Note: the browse location will remain for convenience. This will allow for quick attachment of images.

Attendee Details ✕

First Name:

Last Name:

Company:

Phone: () - x

Email:

Address:

Address 2:

City:

State:

Zip:

Type:

Attended: ☐

Attendee Signature image
